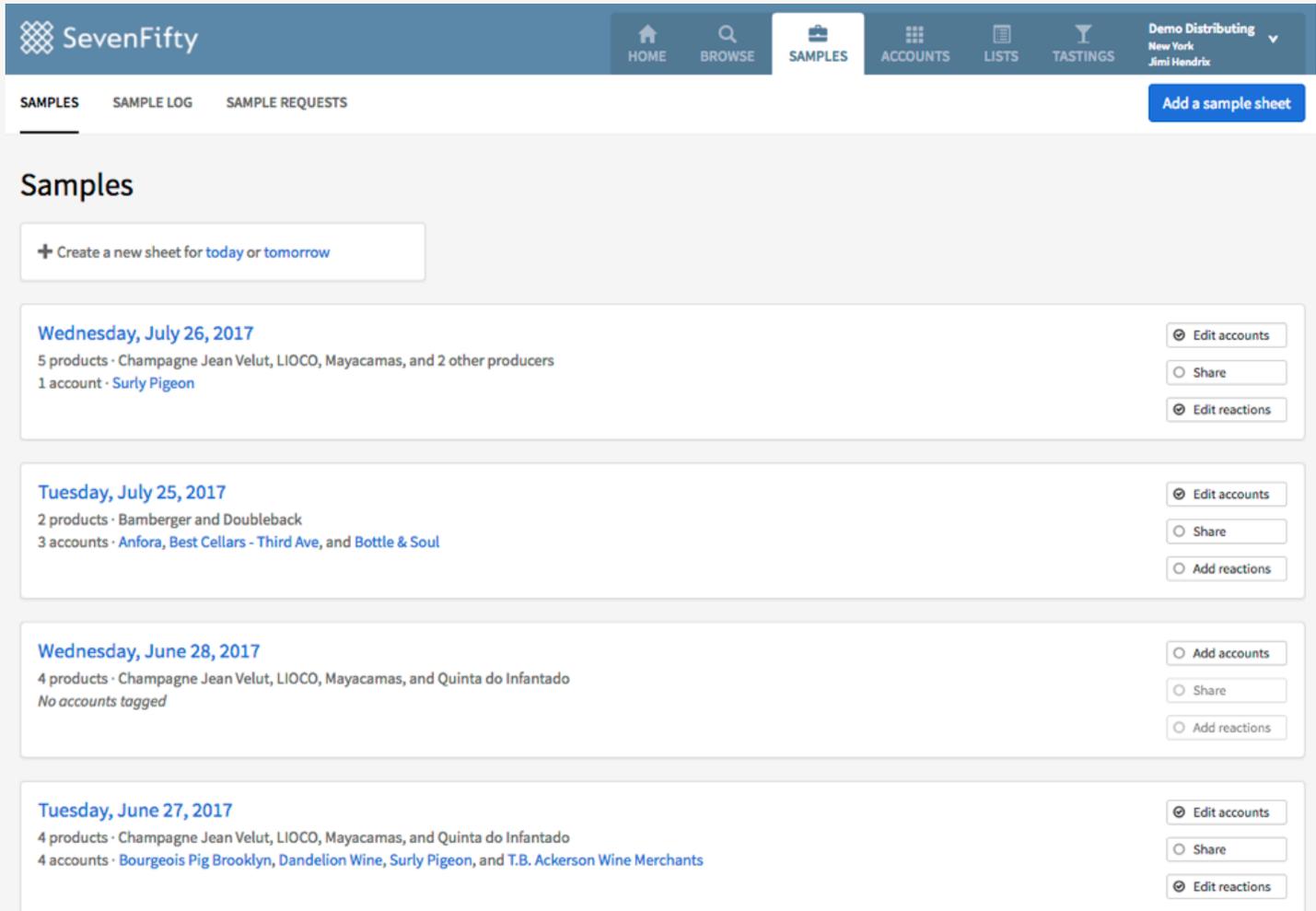


Creating Sample Sheets

The [sample sheet creator](#) is a convenient way for you to create professional presentation sheets for your buyers. You can print them out to bring to appointments and/or share them digitally with your buyers. Sample sheets include pricing, product info, labels and any notes you may want to include.



The screenshot shows the 'Samples' section of the SevenFifty web application. At the top, there is a navigation bar with 'HOME', 'BROWSE', 'SAMPLES', 'ACCOUNTS', 'LISTS', and 'TASTINGS'. A user profile for 'Demo Distributing' is visible in the top right. Below the navigation bar, there are tabs for 'SAMPLES', 'SAMPLE LOG', and 'SAMPLE REQUESTS', along with a blue 'Add a sample sheet' button. The main content area is titled 'Samples' and features a button to 'Create a new sheet for today or tomorrow'. Below this, there is a list of sample sheets organized by date, each with details on products and accounts, and interactive options like 'Edit accounts', 'Share', and 'Edit reactions'.

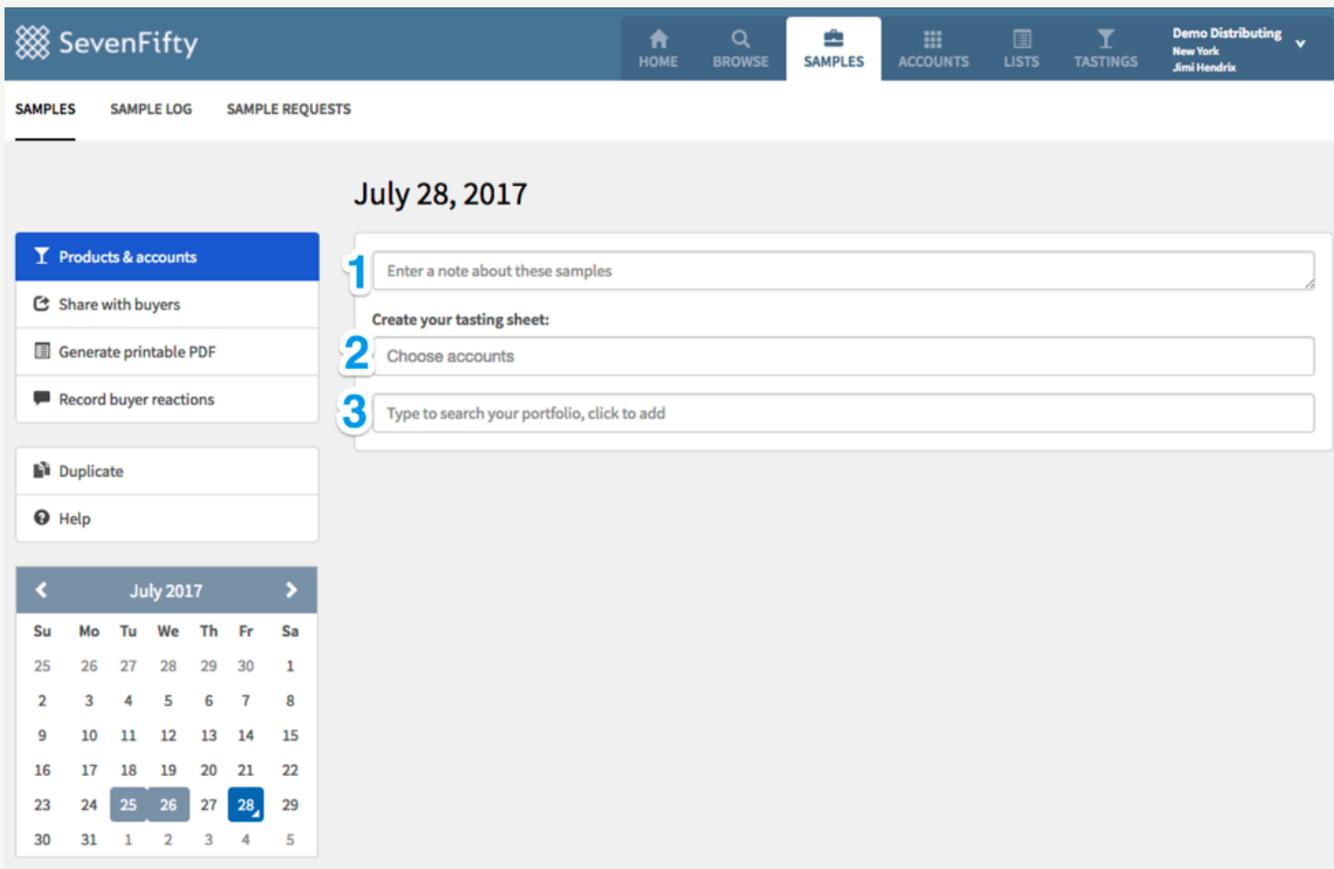
Date	Products	Accounts	Actions
Wednesday, July 26, 2017	5 products · Champagne Jean Velut, LIOCO, Mayacamas, and 2 other producers	1 account · Surly Pigeon	<input checked="" type="radio"/> Edit accounts <input type="radio"/> Share <input checked="" type="radio"/> Edit reactions
Tuesday, July 25, 2017	2 products · Bamberger and Doubleback	3 accounts · Anfora, Best Cellars - Third Ave, and Bottle & Soul	<input checked="" type="radio"/> Edit accounts <input type="radio"/> Share <input type="radio"/> Add reactions
Wednesday, June 28, 2017	4 products · Champagne Jean Velut, LIOCO, Mayacamas, and Quinta do Infantado	No accounts tagged	<input type="radio"/> Add accounts <input type="radio"/> Share <input type="radio"/> Add reactions
Tuesday, June 27, 2017	4 products · Champagne Jean Velut, LIOCO, Mayacamas, and Quinta do Infantado	4 accounts · Bourgeois Pig Brooklyn, Dandelion Wine, Surly Pigeon, and T.B. Ackerson Wine Merchants	<input checked="" type="radio"/> Edit accounts <input type="radio"/> Share <input checked="" type="radio"/> Edit reactions

To create a sample sheet, click on the [Samples](#) tab in the main navigation bar. You'll see a list of samples organized by date. If this is your first time making a Sample Sheet, nothing will appear in this list yet. Create a new sheet by clicking the links below "Samples" to create a sheet for today or tomorrow, or click the blue **Add a sample sheet** button in the top right corner to choose a date from a drop-down calendar.



Getting Started

To begin, you can enter some general notes or a title for the samples **(1)**. You can also choose which accounts you'll be sampling with that day **(2)**. In the "Choose accounts" field, you can start typing the name of an account you want to add and it should autocomplete just below the text field. By tagging the account(s), this will save the items tasted on the sampling history on the account detail page. Then start adding products **(3)**.



July 28, 2017

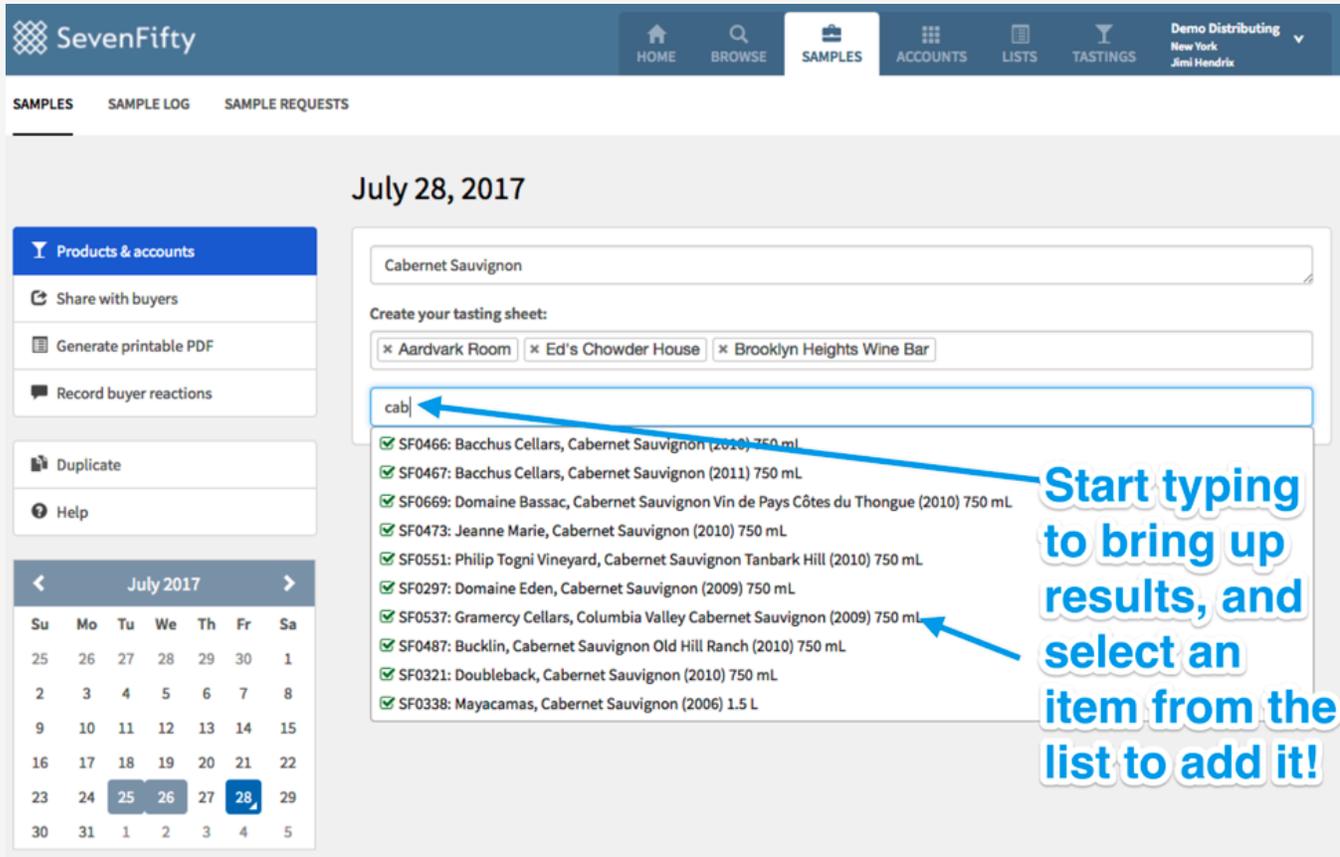
- 1 Enter a note about these samples
- 2 Create your tasting sheet: Choose accounts
- 3 Type to search your portfolio, click to add

Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5



Adding Products

In the third text field, you can start typing to search through your SevenFifty portfolio. Products will start to populate below. You should add products in the order that you want to present them but can always rearrange the order afterwards.



The screenshot shows the SevenFifty application interface. At the top, there is a navigation bar with 'HOME', 'BROWSE', 'SAMPLES', 'ACCOUNTS', 'LISTS', and 'TASTINGS'. Below this is a sub-navigation bar with 'SAMPLES', 'SAMPLE LOG', and 'SAMPLE REQUESTS'. The main content area is titled 'July 28, 2017'. On the left, there is a sidebar with options like 'Products & accounts', 'Share with buyers', 'Generate printable PDF', 'Record buyer reactions', 'Duplicate', and 'Help'. Below the sidebar is a calendar for July 2017, with the 28th highlighted. The main area contains a search bar with 'Cabernet Sauvignon' entered. Below the search bar, there is a section 'Create your tasting sheet:' with three selected locations: 'Aardvark Room', 'Ed's Chowder House', and 'Brooklyn Heights Wine Bar'. A text input field contains 'cab', and a list of search results is displayed below it. A callout box with blue text and arrows points to the search input and the first result, stating: 'Start typing to bring up results, and select an item from the list to add it!'. The search results list includes items like 'SF0466: Bacchus Cellars, Cabernet Sauvignon (2010) 750 mL', 'SF0467: Bacchus Cellars, Cabernet Sauvignon (2011) 750 mL', 'SF0669: Domaine Bassac, Cabernet Sauvignon Vin de Pays Côtes du Thongue (2010) 750 mL', 'SF0473: Jeanne Marie, Cabernet Sauvignon (2010) 750 mL', 'SF0551: Philip Togni Vineyard, Cabernet Sauvignon Tanbark Hill (2010) 750 mL', 'SF0297: Domaine Eden, Cabernet Sauvignon (2009) 750 mL', 'SF0537: Gramercy Cellars, Columbia Valley Cabernet Sauvignon (2009) 750 mL', 'SF0487: Bucklin, Cabernet Sauvignon Old Hill Ranch (2010) 750 mL', 'SF0321: Doubleback, Cabernet Sauvignon (2010) 750 mL', and 'SF0338: Mayacamas, Cabernet Sauvignon (2006) 1.5 L'.

Customizing Your Sample Sheet

When you've added some items to your Sample Sheet, you'll see some options available at the item level. By default, all the accounts you've tagged at the top of the page will appear in field **(1)**, but you can click the X's if you don't plan on showing a particular product to a specific account.

The **Notes** field **(2)** is where you can manually enter notes about the product, or you can select the "More" menu to the right of that field **(3)** to select the Producer or Product Descriptions from the product detail page (when available), or select your previously used notes on the item if there are any.

By clicking "Add price quotes" **(4)** you can alter the pricing that appears to your buyers. If your vendor company has opted to hide certain discounts, you can use this feature to add them back to a finalized Sample Sheet.

The screenshot shows the SevenFifty interface for creating a sample sheet. At the top, there's a navigation bar with 'HOME', 'BROWSE', 'SAMPLES', 'ACCOUNTS', 'LISTS', 'TASTINGS', and a user profile 'Demo Distributing New York Jimi Hendrix'. Below this is a sub-navigation bar with 'SAMPLES', 'SAMPLE LOG', and 'SAMPLE REQUESTS'. The main content area is titled 'July 28, 2017' and features a search bar containing 'Cabernet Sauvignon'. A section titled 'Create your tasting sheet:' shows a list of accounts: 'Aardvark Room', 'Ed's Chowder House', and 'Brooklyn Heights Wine Bar'. Below this is a search input field. The main product card is for 'BACCHUS Bacchus Cellars, Cabernet Sauvignon (2010) - 750 mL x 12 - SF0466'. It includes a 'VERIFIED IN STOCK' badge and a table of pricing for different quantities. A 'More' dropdown menu is visible to the right of the notes field. Annotations 1-4 are placed on the interface: 1 points to the account selection field, 2 points to the notes field, 3 points to the 'More' dropdown, and 4 points to the 'Add price quotes' button. A calendar on the left shows the date July 28, 2017, and a 'Recent sample requests' section is at the bottom left.

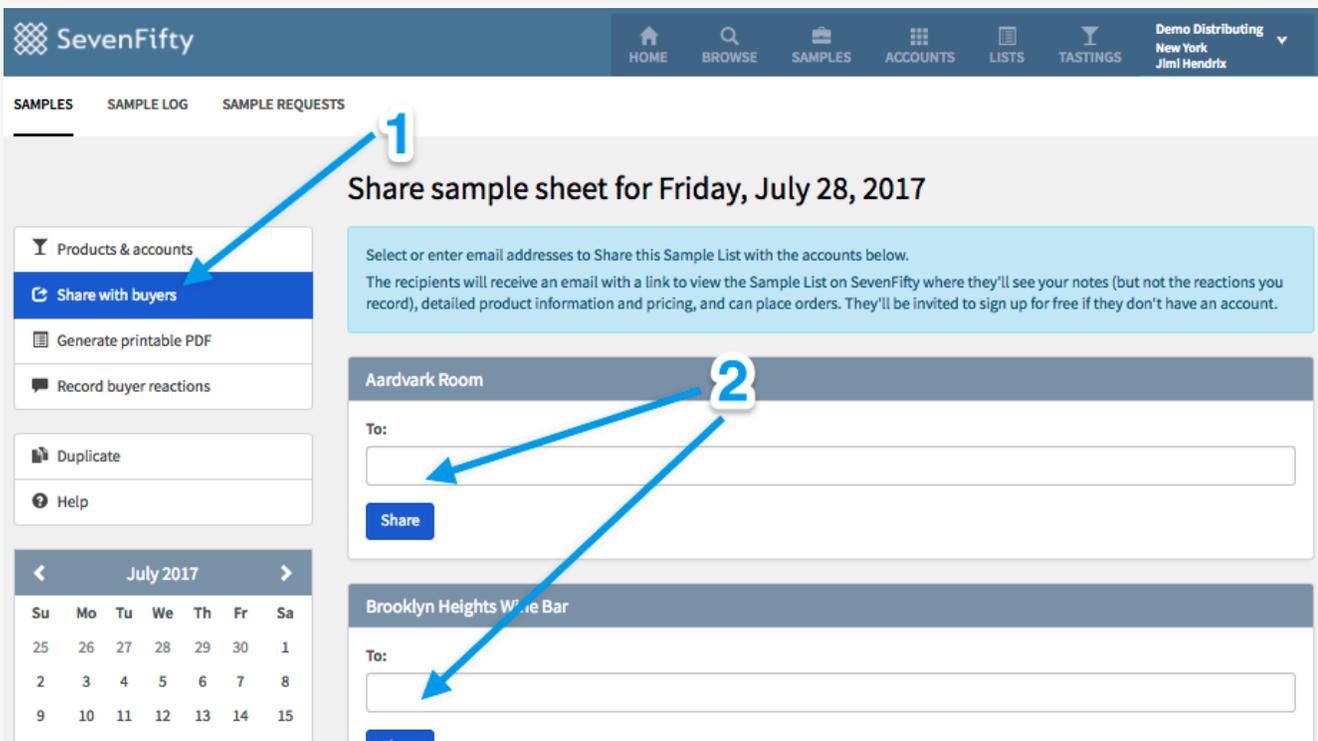
Quantity	Unit Price	Total Price
1	\$8.00	\$96.00
72 (6)	\$7.00	\$84.00
120 (10)	\$6.67	\$80.00



Sharing Your Sample Sheet

You can share your sample sheet in two ways: **Generating a PDF** to download, print, email, or share as you see fit, or **share digitally**.

To share digitally, click the **Share with buyers** button **(1)** in the left-hand toolbar. This will take you to a page allowing you to specify the recipient of each sample sheet by entering the email addresses of your buyers at each account you've tagged when creating the sample sheet **(2)**.



The screenshot shows the SevenFifty web application interface. At the top, there is a navigation bar with the SevenFifty logo and menu items: HOME, BROWSE, SAMPLES, ACCOUNTS, LISTS, and TASTINGS. On the right of the navigation bar, it says "Demo Distributing New York Jimi Hendrix". Below the navigation bar, there are tabs for "SAMPLES", "SAMPLE LOG", and "SAMPLE REQUESTS".

The main content area is titled "Share sample sheet for Friday, July 28, 2017". On the left side, there is a toolbar with several options: "Products & accounts", "Share with buyers" (highlighted with a blue arrow and a circled '1'), "Generate printable PDF", "Record buyer reactions", "Duplicate", and "Help".

The main content area contains a light blue box with the following text: "Select or enter email addresses to Share this Sample List with the accounts below. The recipients will receive an email with a link to view the Sample List on SevenFifty where they'll see your notes (but not the reactions you record), detailed product information and pricing, and can place orders. They'll be invited to sign up for free if they don't have an account."

Below this box, there are two sections for sharing. The first section is for "Aardvark Room" and has a "To:" label and an empty text input field. A blue arrow points to this input field, and a circled '2' is next to it. Below the input field is a "Share" button. The second section is for "Brooklyn Heights Wine Bar" and also has a "To:" label and an empty text input field. A blue arrow points to this input field.

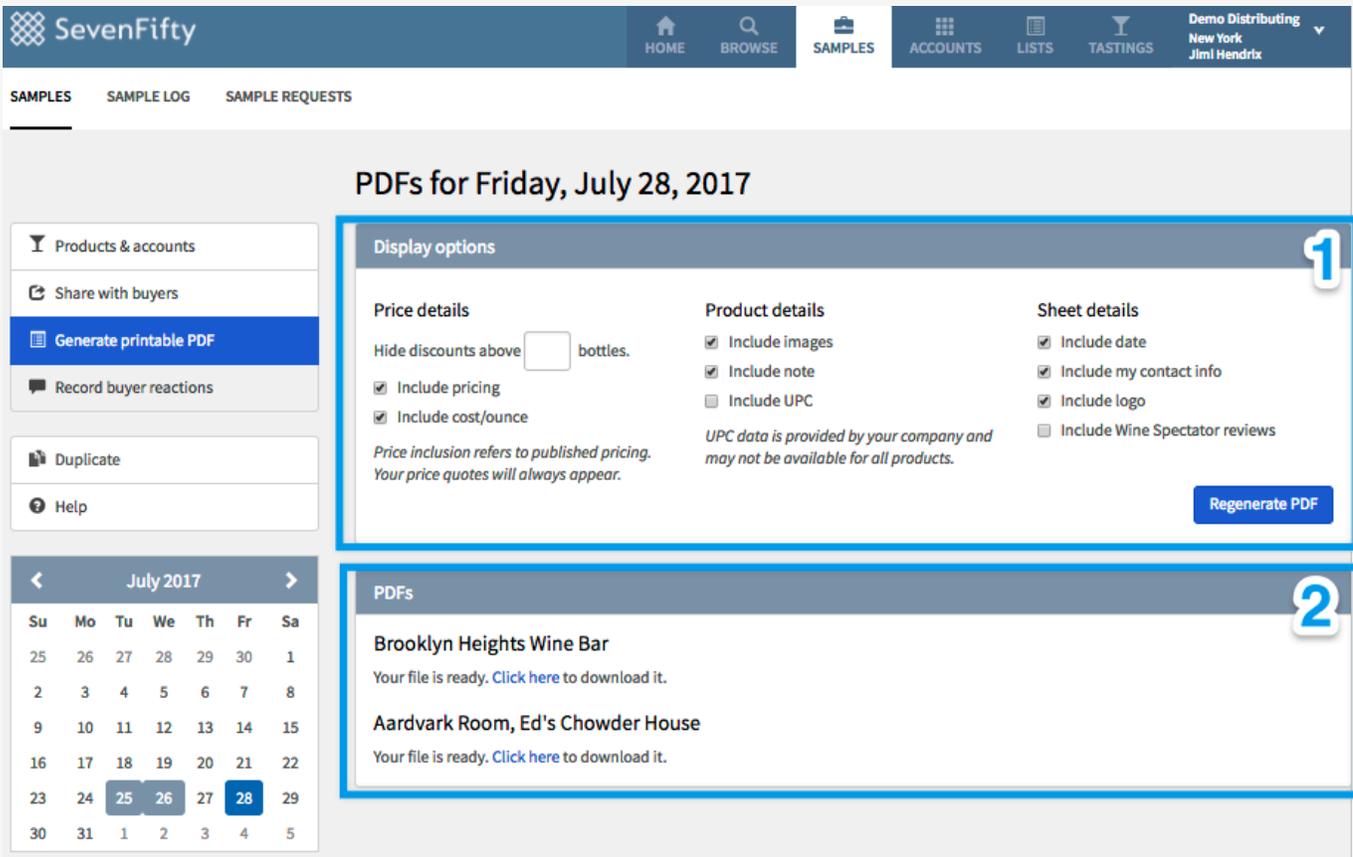
At the bottom left, there is a calendar for July 2017 showing the days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and the dates (25, 26, 27, 28, 29, 30, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15).

Sharing Your Sample Sheet

To print your sample sheet, you can click Generate printable PDF from the left-hand toolbar. This will open up a menu to generate a PDF (Portable Document Format) file which you can then download and print or email as you would any document.

Toggleing the Display options **(1)** will allow you to specify what information you'd like to include in your PDF. Be sure to click Regenerate PDF after toggling any of the listed options to make sure the file you create saves all the changes.

Below the Display options menu will be the PDFs section **(2)**. The PDF generator will create as many unique PDFs as you need, depending on how much you customize tagged accounts when creating your Sample Sheet. For instance, in the above example, if you were sampling all the same products to Aardvark Room as you were at Ed's Chowder House, it would generate one PDF that you could use for both visits, since the products are the same. If you were bringing a different set of products to Brooklyn Heights Wine Bar, or just omitting or adding a few items not shown at other accounts that day, a unique PDF would be generated just for that account



The screenshot shows the SevenFifty web application interface. At the top, there is a navigation bar with the SevenFifty logo, a search bar, and menu items for HOME, BROWSE, SAMPLES, ACCOUNTS, LISTS, and TASTINGS. A user profile for 'Demo Distributing New York Jimi Hendrix' is visible in the top right.

Below the navigation bar, there are three tabs: SAMPLES, SAMPLE LOG, and SAMPLE REQUESTS. The main content area is titled 'PDFs for Friday, July 28, 2017'.

On the left side, there is a sidebar with several options: Products & accounts, Share with buyers, Generate printable PDF (highlighted in blue), Record buyer reactions, Duplicate, and Help.

The main content area is divided into two sections:

- Display options (1):** This section allows users to customize the PDF content. It is divided into three columns:
 - Price details:** Includes options for 'Hide discounts above' (with a text input field), 'Include pricing' (checked), and 'Include cost/ounce' (checked). A note states: 'Price inclusion refers to published pricing. Your price quotes will always appear.'
 - Product details:** Includes options for 'Include images' (checked), 'Include note' (checked), and 'Include UPC' (unchecked). A note states: 'UPC data is provided by your company and may not be available for all products.'
 - Sheet details:** Includes options for 'Include date' (checked), 'Include my contact info' (checked), 'Include logo' (checked), and 'Include Wine Spectator reviews' (unchecked).
 A 'Regenerate PDF' button is located at the bottom right of this section.
- PDFs (2):** This section shows a list of generated PDFs for the date. It lists two accounts:
 - Brooklyn Heights Wine Bar:** 'Your file is ready. Click here to download it.'
 - Aardvark Room, Ed's Chowder House:** 'Your file is ready. Click here to download it.'

At the bottom left, there is a calendar for July 2017, with the date July 28th highlighted in blue.

